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APRA Policy Brief

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Commercialising pastoralist livestock systems in East Africa

Key messages

Trends, surges and impacts: Long-term trends in livestock commercialisation have been evident for decades, and pastoralists are responsive to market demands. Commercialisation can accelerate following development initiatives, such as improved roads or communication, but the benefits of improved market access are often captured by wealthier producers. In general, commercialisation is an important long-term driver of increasing socio-economic differentiation in pastoralist areas.

Livestock sales vs. herd growth: In pastoralist systems, livestock, not cash, is the dominant form of financial capital. Poorer pastoralists aim to build herds to build savings, so logically minimise livestock sales. Herd growth often exceeds cash growth. Animals are only sold when items such as food (cereals), medicines, or school fees are needed. New livestock markets or higher livestock prices don't lead to more sales by poorer herders; livestock market development – especially export market development – as a poverty reduction strategy is flawed.

Commercialisation is political: Infrastructure or other developments that relate directly or indirectly to livestock commercialisation are often framed by planners as apolitical; yet, in reality, issues affecting livestock and trade are highly politicised. For example:

- The political power of ethnic groups and clans is underpinned by wealth, and livestock represent this wealth.
- Development is often uneven, with conscious or unconscious bias, leading to isolation of certain groups from new facilities, tensions, and conflict. Furthermore, the placement of new livestock markets can generate conflict, igniting struggles around anticipated benefits and claims to a rightful share of expected trade.

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Introduction

Across East Africa's vast rangelands, pastoralist livestock systems have been commercialising since the early 1900s. Commercialisation has varied widely within and between areas, but now includes substantial livestock exports, regional and cross-border trade, and supply to domestic markets. Pastoralists have been highly responsive to market demands and will adapt herd composition and other practices to benefit from market opportunities. Extensive trade networks can develop rapidly across countries, often based on informal connections and outside of policies and regulations. In the last 10 years alone, a substantial cross-border trade in camels from eastern Ethiopia into Sudan has evolved (Aklilu and Catley, 2011), as well as a massive trade of donkeys in Kenya to meet demands for skins in China (Maichomo et al., 2018).

In contrast to the clear long-term trends in commercialisation, policies and programmes have often positioned pastoralists as market averse and, in part, this view has been used to justify heavy investments in livestock marketing since the 1970s, especially market infrastructure. Yet, the repeated construction of new livestock markets and abattoirs rarely seems to alter underlying trends in commercialisation. Not only do evaluations of new markets and programmes show how benefits are skewed towards wealthier producers, but commercialisation is widely reported as a key driver of increasing socio-economic differentiation in pastoralist areas. While livestock trade and its benefits are evident for households with larger herds, a depletion of herds in recent decades has forced many others to the edges of pastoralism or out of pastoralism altogether. These

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A camel trader with his herd in an Ethiopian livestock market

long-term trends are reflected in the presence of large-scale social protection programmes in pastoralist areas of Kenya and Ethiopia. These areas are characterised by regular transfers of cash or food to poorer households, while wealthier households supply substantial numbers of livestock to domestic and export markets. This policy brief examines some of the key features of pastoralism that affect how commercialisation evolves in pastoralist societies, and why poorer producers often benefit least from new market access. The policy brief draws on a substantial body of research and programme evaluations, and two new APRA research reports on pastoral livestock commercialisation in south-east Ethiopia (Gebresenbet, 2020) and northern Kenya (Roba, 2020).

Commercialisation over time and long-term impacts

Against the multitude of government policies and aid projects that call for a transformation of pastoralism – from subsistence to market-based systems – is a substantial body of literature showing

that pastoralists have been responding to market opportunities for at least a century. The classic East Africa case is Somalia, which, in 1927, exported 1.8 million sheep and goats (Hunt, 1951). Despite repeated droughts, wars, and livestock trade bans, Somali livestock exports have consistently exceeded one million animals per year since records began, and have often exceeded three million animals. In 2018, Somaliland's Berbera port exported 1.4 million animals, valued at approximately US\$150 million (Somaliland Chamber of Commerce, Industry and Agriculture, 2018).

Although less prominent than in Somali areas, commercialisation has been taking place across many pastoralist areas since at least the 1920s. Selling for the market was often associated with state expansion, road construction, the emergence of trading posts, and tax collection. However, while some livestock sales were an opportunistic response to market demands, other sales were a result of severe livelihood shocks and stresses caused by conflict, rinderpest outbreaks, and droughts (e.g., Galaty and

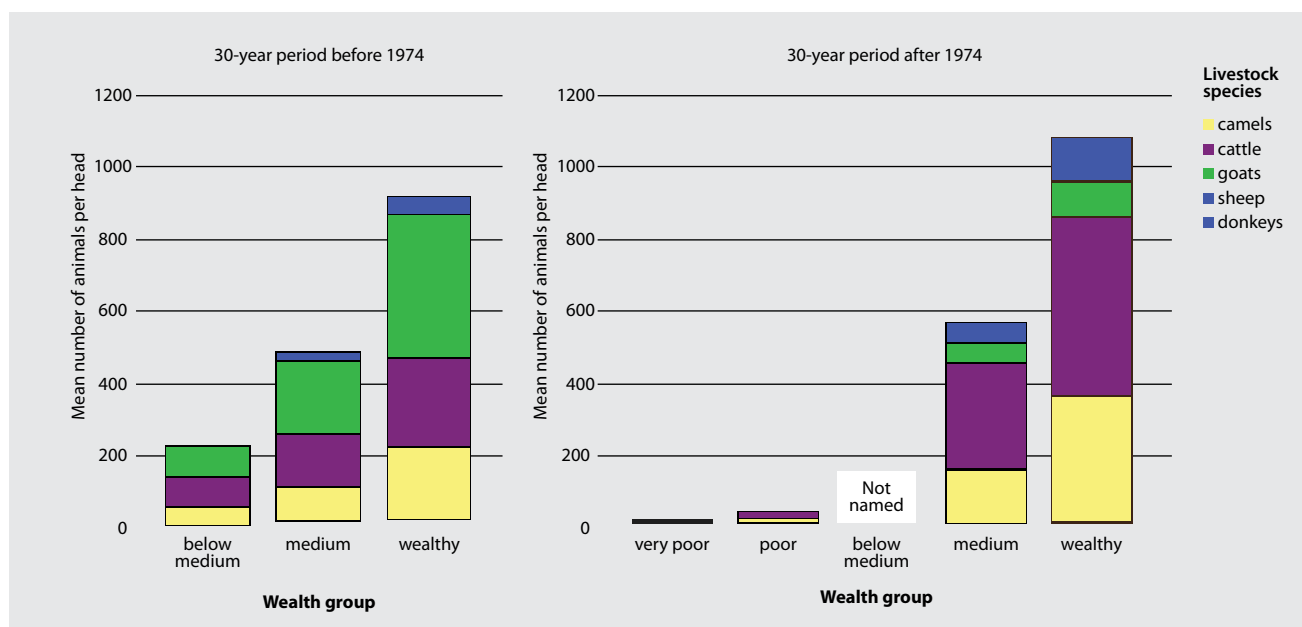


Figure 1. Trends in livestock ownership by wealth group over 60 years (1944–2004), Shinile Zone, Ethiopia

Source: Akilu, Y. and Catley, A. (2011), reproduced by kind permission of Tufts University



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Mieso market, Ethiopia

Bonte, 1991; Ensminger, 1996). Increasingly, pastoralists became more dependent on markets, and although sales or exchanges of livestock for cereals indicated livelihoods under pressure, these sales became normalised.

In accounts of changing pastoral livelihoods in East Africa, commercialisation has been frequently emphasised as a driver of increasing wealth stratification, and economic analyses have explained why larger herds/households tend to displace smaller herds/households in a more commercial pastoral environment (e.g., Abdullahi, 1993). Not only do wealthier herd owners have more surplus animals to sell, over time they can also take control of hitherto communal resources for private use. Poorer herders are then excluded from critical dry season grazing areas or water points, or they pay for access. When droughts, conflict, population growth and other factors are superimposed on these trends, increasing commercialisation and increasing poverty co-exist. Notably, trends in poverty and declining per capita ownership of livestock are evident across diverse pastoralist areas of East Africa, with relatively small numbers of wealthier herders now owning most of the animals in the Afar and Somali regions of Ethiopia (Sabates-Wheeler and Lind, 2013), in Marsabit County in northern Kenya (Mburu et al., 2017), and Karamoja, Uganda (Catley and Ayele, 2018). In the Shinile Zone of Ethiopia, trends in livestock ownership by pastoralist wealth groups over 60 years are illustrated in Figure 1 and show the emergence of 'very poor' and 'poor' wealth groups with very low levels of livestock ownership.

Recent APRA research in South Omo, Ethiopia, clearly shows how different forms of state expansion affect pastoralist groups in terms of commercialisation and livestock sales (Gebresenbet, 2020). In a remote area occupied by Bodi agro-pastoralists, there was very limited contact with the Ethiopian government and very few development initiatives until the mid-2000s, when construction of the massive Gibe III dam began, with related industrial sugar production. Not only did the Bodi lose land to the government's Ethiopian Sugar Corporation, they were also subject to a government sedenterisation programme, which they resisted. The government response was a security/ pacification campaign and, by mid-2018, more than 300 Bodi men were in prison. The

huge influx of labourers to work on the dam construction or sugar plantations created a high demand for meat in the area, and the government constructed a livestock market, arguing that this would ensure good prices for Bodi livestock. However, the volume of sales was low and, critically, the Bodi characterised their market engagement mainly in terms of distress sales, linked to worsening food insecurity. Loss of land affected their traditional flood recession cropping, diseases were killing their livestock, men were in prison and so less labour was available, and insecurity was rife. Despite taking place from around 2011, these distress sales are comparable to those described among many other East African pastoralists since the 1940s. Although at the time of the research in 2018 only two per cent of Bodi were described as destitute, and 55 per cent were described as wealthy, a process of impoverishment across all wealth groups was evident.

Like the Bodi, the Tsemay in South Omo had been agro-pastoralists but they experienced a transformation of their livelihoods after central state expansion into their area began in the 1960s. Government programmes included road building, commercial farming, and sedenterisation campaigns. At the time of the APRA research, the Tsemay were far more settled and livestock marketing and monetisation of Tsemay livelihoods was already well-established; sales of livestock to buy cereals and basic commodities were normal. For government officials, the market engagement and increasingly cash-based economy of the Tsemay was seen as evidence of their modernisation and development. However, in contrast to the Bodi, there was more marked wealth inequality among the Tsemay, with more destitute households (12 per cent) and fewer wealthy households (29 per cent). Furthermore, wealthier Tsemay had adapted their herds into two types: a herd for 'breeding and herding' and a herd for 'the market', and these owners were the main suppliers of livestock to the local markets.

Marketing behaviours and local vs. long-distance trading

In pastoralist systems, livestock are a productive asset, providing milk, meat, and blood, but are also the main form of financial savings. Production and marketing practices involve balancing production and savings objectives in a context where herd performance as a form of financial growth often exceeds opportunities for cash-based growth. These basic economic aspects of pastoralism largely explain why pastoralists tend to limit livestock sales to meet domestic needs such as food purchases, health care, or education. As livestock reproduce and herds grow, there is a clear economic logic to protecting and building financial capital rather than generating cash – for which there is limited use and few investment options (Barrett et al., 2006). Another reason for growing herds is to withstand drought. Although high livestock mortality due to drought affects herds of all sizes, poorer households with smaller herds are at more risk of losing animals to such an extent that prevents recovery. Wealthier households can also buy up the stock of poorer households during drought and more ably afford supplementary animal feed, if available.

In general, wealthier households supply most of the livestock to markets. These households have larger herds which require more labour and expenditure, and lead to more livestock sales. These households are also able to coincide livestock sales to periods when prices are higher, and are able to buy animals from poorer households during stress periods. Wealthier households might also diversify into business or other activities, and they use livestock sales to fund these activities. For poorer households, the main



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A camel market

economic strategy is financial growth via herd growth. Livestock sales are minimised and tend not to be price responsive.

These economic characteristics and risks of pastoralist livelihoods are repeatedly overlooked by policy makers or marketing experts, who usually assume that livestock off-take in pastoralist areas will always increase if more markets, abattoirs, or related facilities are constructed, thereby generating wealth for poorer pastoralists. Yet, this is not the case. As livestock are the main type of financial capital, sales by pastoralists will always be balanced against the need to maintain or build financial assets. Where market responsiveness occurs, it is usually among wealthier producers. National livestock marketing policies also emphasise support to export markets. However, the specific types and numbers of animals required by traders for these markets are far more easily sourced from wealthier pastoralists (Little et al., 2014), and analysis of the livestock export from East Africa clearly shows how benefits are captured by the owners of larger herds (Aklilu and Catley, 2009). There are also numerous accounts of wealthier producers adapting herd structures and splitting herds into a 'traditional herd' focusing on milk production and herd growth (financial capital), and a 'market herd' that is managed for livestock sales.

The question of which types of markets benefit which types of producers in pastoralist systems is explored in APRA research in Marsabit County, Kenya's largest arid and semi-arid county (Roba, 2020). For many years, the physical isolation of Marsabit was reflected in the tarmac road from Nairobi to Moyale (on the Kenya-Ethiopia border) ending at Archer's Post, just north of Isiolo. Not only was the dirt road between Marsabit and Moyale often impassable during heavy rain, but the route was notorious for banditry, and police escorts were often needed. This situation limited the livestock trade links between Marsabit and Nairobi's main meat market in Dagoretti, as well as other major cities.

In 2008, the Kenyan government launched its long-term development programme, 'Kenya Vision 2030', which included a renewed commitment to a regional infrastructure project, the Lamu Port-South Sudan-Ethiopia-Transport (LAPSSET) Corridor Project. The project positioned Kenya as the gateway to regional

markets, linking it directly to Ethiopia and South Sudan through the development of roads, railways, and other infrastructure. Under LAPSSET, a tarmac road from Archers Post to Moyale was finally completed in 2014, reducing the travel time between Moyale and Nairobi from about three days to 10 hours. The new road was associated with the emergence of new settlements and trading centers alongside it, as well as business expansion in Marsabit town and Moyale. As the APRA research shows, increasing trade in sheep and goats four years after the new road opened could be categorised as 'short chains' and 'long chains'. Short chains were very localised livestock sales within ethnic boundaries and sub-counties, involving actors of a specific ethnic group. Transactions in these chains relied heavily on social networks and kinship ties. In contrast, long chains covered the sale and trucking of animals to Kenya's main cities, with some of these animals exported to the Middle East. The long chains involved far higher volumes of animals, and traders and transporters of various ethnic groups. This trade is supported by primary markets close to the grazing areas where the animals are reared, reducing trekking time and costs to the markets. Notably, the primary 'markets' do not necessarily involve a physical marketplace, but rather livestock sales at water points or in villages.

In general, wealthier and better organised pastoralist producers are suppliers to the long sheep and goats market chains. These chains carry both higher profits but also higher risks for local traders, as control over sales shifts to brokers and end-market clients. Short market chains seemed to carry lower prices but lower risks, partly because of the social network element of these chains. These chains have attracted increasing numbers of women traders; whereas women are less able to engage in long chain trade because it can require extended periods away from home. Another important development was the emergence of local livestock marketing groups. To some extent, these can allow poorer herders to pool their animals, increase their bargaining power, and better arrange the timing of sales to benefit from higher prices. Self-formed local groups in southern Marsabit performed better than groups that were established in response to non-government organisation (NGO) projects, with performance closely linked to group governance using traditional socio-cultural practices (Lotira et al., 2020).

Although the recent trend in livestock marketing in Marsabit County can be seen as a positive development, the APRA research also highlights a clear spatial variation across the county in terms of who benefits. The county is more than twice the size of Belgium, and most communities have limited access to the new highway, so continue to have limited access to markets and services.

The politics of livestock trade

The huge value of livestock trade in East Africa means that control of the trade and capturing benefits, such as domestic taxes or foreign currency earnings, are matters of national politics, economies, and pride. The trade also affects political relationships between countries, as exemplified in the export of livestock from northern Somali ports and Djibouti. On the export side, the trade involves four states – Djibouti, Ethiopia, Puntland, and Somaliland – and is complicated by issues such as Ethiopia's land-locked position and dependency on ports, and a substantial informal cross-border livestock trade from Ethiopia towards the ports (Eid, 2014). Whereas Ethiopia regards these animals as Ethiopian and so subject to Ethiopian control and taxation, production is mainly by Somali pastoralists in Ethiopia's Somali Region, who have strong ethnic and trading ties with Somalis across a lengthy and often remote border. As each state seeks to benefit from the trade, the wider formal policy context is regional economic integration which, theoretically, supports the free movement of goods, services, and people. In the case of the Intergovernmental Authority on Development, economic integration of its Member States is both an end in itself and a way to support regional peace and political stability.

Since the early 1970s, policies and project proposals have lamented the irrational production and marketing behaviours of pastoralists, and supported livestock marketing as a strategy for area-wide poverty reduction. As a result, these areas have seen waves of market infrastructure development but with very limited evidence to show that new markets have positive impacts on poverty. As outlined above, there are clear economic reasons why pastoralists respond to market demands to some extent, while also limiting sales of their livestock. Poorer pastoralists in particular tend not to be price responsive. Indeed, if livestock prices increase relative to cereal prices, then pastoralists can sell fewer animals to meet their domestic food needs.

One result of the persistent misunderstandings about selling behaviour is that many pastoralist areas are littered with derelict markets, holding grounds, and abattoirs. While livestock markets are critical to pastoral livelihoods, these markets don't require modern infrastructure to make them function. For example, as Somali livestock exports boomed in the 1970s, *'The basic requirements, so far as market facilities are concerned, appear to be ample space for transactions and the provision of drinking water for market users. Little justification for investment in fencing, pens, scales or auction rings can be established since the system appears to work well in its present simple, highly flexible form'* (Reusse, 1982). Yet, this simplicity seems to offend marketing experts within aid donors and governments, who continue to call for commercialisation based on better market infrastructure. From 2005–2008, 25 new livestock markets were constructed in pastoralist regions of Ethiopia in yet another attempt to commercialise pastoralism (which was already commercialising). A project evaluation included visits to 18 of the new markets, but only nine were functioning and only 27% of the 'modern' facilities were being used (PLI Policy Project, 2010). In some cases, new markets were constructed at the site of pre-existing bush markets, but sellers and traders continued to operate in the bush markets to avoid taxes and market fees. In other cases, the poor placement of new markets sparked local violent conflicts which remained unresolved

and led to them being unused. This evaluation also questioned the quality of market construction, hinting at the substantial profits to be gained by contractors and their supporters in contexts of weak contracting procedures and supervision. For bush markets, the only improvement required was basic loading ramps to ease the movement of animals onto trucks.

Following devolution in Kenya in 2010, political pronouncements on the need to commercialise pastoralism and respond to market demands shifted from national to county-level, and pastoralist counties across northern Kenya were awash with plans not only to build new markets and abattoirs, but also airstrips for the export of chilled meat. In Garissa, Isiolo, Mandera, Marsabit, and Wajir, the local county government budgets for these projects amounted to over US\$40 million, excluding contributions to market and abattoir construction from aid projects (Mahmoud, 2016). Yet, detailed or plausible feasibility studies or business plans were often elusive in both government and aid projects, and typically these initiatives were based on vague promises of accessing export markets and reducing poverty. While these new facilities allowed photo opportunities for local politicians and aid organisations, their long-term management and relevance was very uncertain.

From the APRA case studies, it is clear that state-led infrastructure projects in pastoralist areas reflect high-level political ambitions and programmes, with objectives that are framed around regional or national development. The impacts of these programmes mirror early state expansion into drylands from the 1920s. In some cases, large-scale infrastructure or commercial agriculture displaced pastoralists – sometimes forcibly – with no or minimal compensation and few options for alternative livelihoods. For example, in the 1960s, the establishment of irrigated sugar plantations in the Awash Valley of Ethiopia directly contributed to a decline in Karrayu and Afar pastoralist systems as key grazing and water resources were lost, and migrant workers were employed on the new scheme. With this history, the impacts of the Gibe III dam development in South Omo from the mid-2000s are somewhat predictable in terms of outcomes for pastoralists such as the Bodi.

Conclusions

Livestock commercialisation has been a reality in many pastoralist areas for decades, but the economic, social, and environmental features of pastoralism mean the benefits of commercialisation are captured by wealthier households, and that livestock sales are balanced against the need to maintain or grow herds for financial capital. Although commercialisation is promoted as universally beneficial by policies and aid programmes, in pastoralist systems, it is an important driver of increasing wealth stratification. Livestock commercialisation works for those with large enough herds – the relatively wealthy – and can create new jobs in herding, market yards, fodder production, and other livestock-related work. But most households in East Africa's pastoralist areas have too few animals to commercialise and are 'livestock poor and cash poor'. Over time, wealthier herd owners have capacity to appropriate key grazing and water resources, adapt herd management to both maintain a traditional herd and rear for the market, and are better able to manage the impacts of drought.

Many poorer pastoralist households face an uncertain future, and it is for these households that policy and programming support is most needed. The economic strategy preferred by these households is herd growth as a means to build financial assets. Rather than livestock markets, the priorities are secure access to pasture and water, and reducing mortality through better drought management and veterinary care. Market access is important, but basic roads and communications are the main types of infrastructure needed.

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